



Do You Have Your Financial Plan?

Discover what you need to know to prepare for a secure retirement income.

Whether you are just beginning the financial planning process or have already laid the foundation and are building a secure retirement future, CalPERS has a **Free Financial Planning Seminar** that will meet your needs.

If you are more than 10 years away from retirement:

Achieving Financial Security 8:30 AM – 3:45 PM

If you are 10 or less years away from retirement:

Retirement and Estate Planning 8:30 AM – 3:45 PM

Topics Include:

- *CalPERS Benefits*
- *Financial Planning (goal-setting, budgets, spending, saving, increasing retirement income)*
- *Insurance*
- *Investment Basics and Strategies*
- *Estate Planning*

It's easy to register. Find a date and location on the attached schedule, then do one of the following:

- **Call Toll Free 888 CalPERS (or 888-225-7377)**
- **Mail or fax the completed registration form to your local CalPERS Regional Office. (FAX numbers located on Registration Form)**
- **View the schedule and register online using your User ID at www.calpers.ca.gov**

Enrollments will be confirmed in writing. Seminar materials will be sent approximately two weeks prior to date of seminar.

January- June 2006 DATES AND LOCATIONS OF FINANCIAL PLANNING SEMINARS

AFS = Achieving Financial Security

REP = Retirement and Estate Planning

CalPERS Regional Offices

Sacramento Office

SACRAMENTO

AFS – Jan 7, Jan 18, Feb 3,
Feb 28, Mar 2, Mar 28, Apr 4,
Apr 15, Apr 25, May 3, Jun 15
REP - Jan 5, Jan 27, Feb 1,
Feb 9, Feb 15, Feb 24, Feb 25,
Mar 8, Mar 11, Mar 13, Mar 21,
Mar 23, Apr 7, Apr 10, Apr 18
Apr 27, Apr 29, May 5, May 11,
May 17, Jun 14, Jun 17,
Jun 28
AUBURN
REP- Apr 6
CHICO
AFS- Jan 12
REP- May 9
MODESTO
REP- Feb 16, Jun 27
REDDING
REP- Jan 19, Mar 15, May 25
AFS- Mar 16, May 24
SONORA
REP- Apr 13
STOCKTON
REP- Feb 7, Jun 22
YUBA CITY
REP- Jan 25

San Diego Office

SAN DIEGO

AFS- Feb 1, Apr 18
REP- Feb 3, Mar 9, Apr 19, May 16,
Jun 1, Jun 20

San Jose Office

MOUNTAIN VIEW

REP- Apr 27
GILROY
REP- Mar 7
REDWOOD CITY
REP- Mar 29
AFS- Jun 22
SAN CARLOS
AFS- Jun 6
SAN JOSE
REP - Jan 31, Mar 30, Apr 25,
Jun 20
AFS- Feb 17, Jun 8
SANTA CRUZ
AFS- Apr 11
REP- Feb 15
WATSONVILLE
REP- May 18

San Francisco Office

SAN FRANCISCO

REP – Mar 16, Apr 28,
May 18
AFS – Feb 10, Mar 17,
May 19
ARCATA
REP- Feb 2, Jun 22
CRESCENT CITY
REP- Jan 31
OAKLAND
REP- Apr 21
SANTA ROSA
REP- Mar 28
UKIAH
REP- Jan 5
VACAVILLE
REP- May 9

Orange Office

ORANGE

REP - Mar 9, Apr 18,
May 31, Jun 21
AFS- Feb 14, Apr 6
SIGNAL HILL
REP- May 18
CERRITOS
REP- Feb 1

Fresno Office

FRESNO

REP - Feb 7, Jun 23
AFS- Apr 11
BAKERSFIELD
REP- Mar 7, May 2
AFS- Apr 19
MERCED
REP- Feb 16
MONTEREY
REP - Mar 14
AFS- Jun 27
SALINAS
REP- May 11
VISALIA
REP- Mar 30
AFS- Jun 13

Glendale Office

GLENDALE

AFS - Feb 2, Mar 11,
Apr 13, Jun 9
REP - Jan 26, Feb 4,
Feb 17, Mar 23, Apr 11,
Apr 21, Jun 13, Jun 30
BELLFLOWER
REP- Mar 7
COVINA
REP- Apr 25
CULVER CITY
AFS- Feb 21
EL SEGUNDO
AFS- Mar 28
HAWTHORNE
REP- Apr 19
LOS ANGELES
REP- Mar 29
NORWALK
REP- Apr 12
PISMO BEACH
AFS- Apr 28
REP- Apr 29
SANTA BARBARA
AFS- Jun 27
REP- Jun 28
SAN LUIS OBISPO
REP- Feb 8
WALNUT
REP- Mar 21
WHITTIER
REP- June 6
VENTURA
AFS- Jun 21
REP- Mar 2

San Bernardino Office

SAN BERNARDINO

REP- Jan 18, Apr 4, May 3, Jun 20
AFS- May 4
MONTCLAIR
AFS- Mar 1
RIVERSIDE
REP- Mar 2

*Log on and register for the seminar of your choice at www.calpers.ca.gov.
Also see a complete course description and an up-to-the-minute list of
available seminars in your area. Registration is also available by calling
CalPERS at toll-free (888) 225-7377*

Updated 12/16/05

FINANCIAL PLANNING SEMINAR REGISTRATION

SECTION I: CalPERS Regional Offices

SACRAMENTO

400 Q Street, Lincoln Plaza East
Suite 1820
Sacramento, CA 95814
FAX (916) 795-7878

SAN FRANCISCO

301 Howard St.
Suite 2020
San Francisco, CA 94105
FAX (415) 369-8501

GLENDALE

655 North Central Ave.
Suite 1400
Glendale, CA 91203
FAX (818) 662-4304

SAN BERNARDINO

650 East Hospitality Lane
Suite 330
San Bernardino, CA 92408
FAX (909) 806-4820

FRESNO

10 River Park Place East
Suite 230
Fresno, CA 93720
FAX (559) 440-4901

SAN JOSE

181 Metro Drive
Suite 520
San Jose, CA 95110
FAX (408) 451-8001

ORANGE

500 No. State College Blvd.
Suite 750
Orange, CA 92868
FAX (714) 939-4701

SAN DIEGO

7676 Hazard Center Drive
Suite 350
San Diego, CA 92108
FAX (619) 220-7201

To Register: Call (888) CalPERS (888-225-7377) or Mail/FAX Form to Appropriate CalPERS Office

*Privacy Statement: Providing the Social Security Number is voluntary in accordance with the Information Practices Act of 1977 and the Privacy Act of 1974 (PL93-679). If provided, the Social Security Number may be used by departments to maintain records of training requested and attended by members.

SECTION II: Seminar Information

CHECK ONE ☐ **ACHIEVING FINANCIAL SECURITY** ☐ **RETIREMENT & ESTATE PLANNING**

BOX ONLY: (For members *more than 10 years* from retirement) (For members *10 or less years* from retirement)

| | | |
|---------------|------|----------|
| First Choice | Date | Location |
| Second Choice | Date | Location |
| Third Choice | Date | Location |

SECTION III: Member Information

Member's Social Security No.: **Member's Name:** Last First (Print or Type)

Employer:

Disability Accommodation: ☐ Auditory ☐ Mobility ☐ Visual ☐ Other

Type of Accommodation Needed (Please specify):

SECTION IV: Spouse/Partner Information

Will Spouse/Partner Attend? ☐ YES **Is Spouse/Partner a CalPERS Member?** ☐ YES (If YES, complete this section)

Spouse/Partner's Social Security No.: **Spouse/Partner's Name:** Last First (Print or Type)

Spouse/Partner's Employer:

SECTION V: Enrollment Notification Information

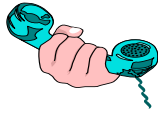
Where Should Enrollment Notification Be Sent? ☐ to MEMBER ☐ to EMPLOYER

Employer's Name: **Daytime Telephone Number:**

Division and ARU/MIC: (if applicable)

Member's or Employer's Address: **Contact Person (if applicable)**

City, State, and Zip Code: **Your Daytime Phone Number:**



QUESTIONS?

CALL TOLL FREE (888) CalPERS (225-7377)

Notification of Enrollment

An initial letter of enrollment notification will be mailed to the member.

A second notification letter with program materials will be mailed approximately two weeks before the seminar date.

Cancellations

If you find that you will be unable to attend your scheduled seminar, please phone your cancellation to CalPERS at Toll Free (888) CalPERS (225-7377).

Additional Information

For specific information regarding the seminars (facility, address, etc.), contact CalPERS at Toll Free (888) CalPERS (225-7377).

CalPERS Web Site - www.calpers.ca.gov

